

ORDER FOR SUPPLIES AND SERVICES					IMPORTANT: See instructions in GSAR 553.370-300-1 for distribution		PAGE 1 OF 2 PAGE(S)	
1 DATE OF ORDER 09/30/2018			2 ORDER NUMBER 47QFDA18F0067		3 CONTRACT NUMBER GS35F540GA		4 ACT NUMBER A21914285	
FOR GOVERNMENT USE ONLY		5. ACCOUNTING CLASSIFICATION				6. FINANCE DIVISION		
		FUND 285F	ORG CODE Q11FA000	B/A CODE AA20	O/C CODE 25	AC	SS	VENDOR NAME
		FUNC CODE AF151	C/E CODE H08	PROJ /PROS NO	CC-A	MDL	FI	G/L DEBT
		W/ITEM	CC-B	PRT /CRFT	AI	LC	DISCOUNT	
7 TO: CONTRACTOR (Name, address and zip code) (b) (6) ACCENTURE FEDERAL SERVICES LLC 800 NORTH GLEBE RD #300 ARLINGTON, VA 222031807 United States (b) (6)					8 TYPE OF ORDER B DELIVERY		REFERENCE YOUR	
					Please furnish the following on the terms specified on both sides of the order and the attached sheets, if any, including delivery as indicated			
					This delivery order is subject to instructions contained on this side only of this form and is issued subject to the terms and conditions of the above numbered contract			
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9A EMPLOYER'S IDENTIFICATION NUMBER 412048319					9B CHECK, IF APPROP WITHHOLD 20%		Except as provided herein, all terms and conditions of the original order, as heretofore modified, remain unchanged	
10A CLASSIFICATION 2X For-Profit Organization					10B TYPE OF BUSINESS ORGANIZATION C Corporation			
11 ISSUING OFFICE (Address, zip code, and telephone no.) GSA Region 11 Alberto Munoz 301 7th Street Washington, DC 20407-0000 United States 202-734-4226			12 REMITTANCE ADDRESS (MANDATORY) ACCENTURE FEDERAL SERVICES LLC 800 NORTH GLEBE RD #300 ARLINGTON, VA 22203-1807 United States		13 SHIP TO(Consignee address, zip code and telephone no.) Department of Agriculture 1400 Independence Ave SW Washington, DC 20250-0000 United States 202-734-4226			
14 PLACE OF INSPECTION AND ACCEPTANCE Kevin Drummond 1800 F Street NW Washington, DC 20006-0000 United States					15 REQUISITION OFFICE (Name, symbol and telephone no.) Kevin J Drummond GSA Region 11 301 7th ST NW WASHINGTON, DC 20407-0001 United States (202) 809-1315			
16 F O B POINT Destination			17 GOVERNMENT B/L NO		18 DELIVERY F O B POINT ON OR BEFORE 09/29/2019		19 PAYMENT/DISCOUNT TERMS NET 30 DAYS / 0 00 % 0 DAYS / 0 00 % 0 DAYS	
20. SCHEDULE								
ITEM NO (A)	SUPPLIES OR SERVICES (B)	QUANTITY ORDERED (C)	UNIT (D)	UNIT PRICE (E)	AMOUNT (F)			
0001	Task 1 - Design	1	lot	(b) (4)				
0002	Task 2 - Knowledge Management Solution/Content Management Tool	1	lot					
0003	Task 3 - Organizational Change Management Plan	1	lot					
0004	Task 4 - Ongoing Innovation Program	1	lot					
0005	Travel	1	lot					
0006	Phase In/Phase Out	1	lot					
21 RECEIVING OFFICE (Name, symbol and telephone no.) USDA, (202) 720-0223						TOTAL		
						From 300-A(s)		
22 SHIPPING POINT Specified in QUOTE				23 GROSS SHIP WT		GRAND TOTAL		\$7,932,588.99

<p><b>24 MAIL INVOICE TO:</b> <i>(Include zip code)</i></p> <p>General Services Administration (FUND)</p> <p>The contractor shall follow these <a href="#">Invoice Submission Instructions</a>. The contractor shall submit invoices electronically by logging into the ASSIST portal (<a href="https://portal.fas.gsa.gov">https://portal.fas.gsa.gov</a>), navigating to the appropriate order, and creating the invoice for that order. For additional assistance contact the ASSIST Helpdesk at 877-472-4877. Do NOT submit any invoices directly to the GSA Finance Center (neither by mail nor via electronic submission).</p>	<p><b>25A FOR INQUIRIES REGARDING PAYMENT CONTACT:</b> GSA Finance Customer Support</p> <p><b>26A NAME OF CONTRACTING/ORDERING OFFICER(Type)</b> Alberto Munoz</p>	<p><b>25B TELEPHONE NO</b> 816-926-7287</p> <p><b>26B TELEPHONE NO</b> 202-734-4226</p>
<p><b>GENERAL SERVICES ADMINISTRATION</b></p>	<p><b>26C SIGNATURE</b> Alberto Munoz 09/30/2018</p> <p><b>1. PAYING OFFICE</b></p>	<p><b>GSA FORM 300 (REV 2-93)</b></p>

**SCHEDULE A - SUMMARY****U.S. Department of Agriculture**

Accenture Federal Services, LLC

**Solicitation No.** 1312133 / 47QFDA18K0061 (Alliant)  
**Solicitation Title:** OneUSDA Contact Center  
**Period of Performance:** 10/1/2018 - 9/30/2019  
**Contract Type:** Firm, Fixed Price (FFP), with Cost-Reimbursable Travel

CLIN	Total Firm, Fixed Price
0001	(b) (4)
0002	
0003	
0004	
0005	
0006	
Grand Total FFP	\$ 7,932,588.99

**United States Department of Agriculture and  
General Services Administration  
IT Modernization Centers of Excellence OneUSDA Contact Center  
Firm Fixed Price Contract Line Item Number (CLIN) Structure**

PERIOD OF PERFORMANCE: 12 months

<u>CLIN</u>	<u>Description</u>	<u>QTY</u>	<u>Unit of Issue</u>	<u>Total Price</u>
0001	Task 1 - Design of an omni-channel OneUSDA Contact Center for all of USDA under 1-866-ASK-USDA (or similar phone number).	1	Job	(b) (4)
0002	Task 2 - An enterprise-wide integrated knowledge management solution and content management tool housing Tier 0 and 1 knowledge (with Tier 2 being added over time)	1	Job	(b) (4)
0003	Task 3 - Provide an Organizational Change Management Plan	1	Job	(b) (4)
0004	Task 4 - Ongoing innovations program throughout the life of the contract through a continuous improvement program that includes periodic "test and learn" projects	1	Job	(b) (4)
0005	Travel – Cost reimbursable item in accordance with Alliant contract clause B.8		NTE	(b) (4)
0006	Phase-In/Phase-Out Services		LS	(b) (4)

**TOTAL ALL CLINS:**

**\$7,932,588.99**

**USDA**



**Contact Center CoE Phase II  
Statement of Work**

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# 1. Introduction

The U.S. Department of Agriculture (USDA) is embarking on a multi-phase initiative to create and execute an enterprise-wide customer service strategy that will put USDA on par with best-in-class commercial service providers. This acquisition represents the first phase of this USDA customer experience roadmap.

Under this contract, the Contractor must provide:

- Design of an **omni-channel OneUSDA Contact Center** that will serve as the “front door” for all USDA programs and will answer all Tier 0, Tier 1 inquiries and ultimately many Tier 2 service and information requests that serve external customers (e.g., public). Design work includes a concept of operations and the entire contact center technology stack for the OneUSDA Contact Center, incorporating and integrating with existing USDA technology. The Project Manager will also work with USDA executives on a strategy to transfer all operating responsibilities to USDA when the system is operational and stabilized.
- Creation of a **centralized knowledge management solution** integrated with a customer relationship management (CRM) and content management tool that will supply consistent information to all digital, voice, social media, and service center interactions with customers.
- **Innovations in technology and business processes** to improve the customer experience and improve efficiencies.
- **Organizational change management and continual improvement programs** to “institutionalize” cultural transformation, obtain staff buy-in, and ensure both technical and operational improvements.

Not included in this contract are staffing of call center agents. USDA will be providing call center agents for this OneUSDA contact center. Also not included are the purchase/provision of duplicative platforms, for which USDA already has licenses. The Government has a Salesforce Enterprise License Agreement to use Salesforce Service Cloud and licenses will be provided as GFE if chosen. If Salesforce is not chosen, the Contractor must be able to seamlessly integrate tools proposed with Salesforce Service Cloud.

## 2. Background and Objectives

### 2.1 Background

The mission of the United States Department of Agriculture (USDA) is to provide leadership on food, agriculture, natural resources, rural development, nutrition, and related issues based on public policy, the best available science, and effective management.

USDA has a vision to provide economic opportunity through innovation, helping rural America to thrive; to promote agriculture production that better nourishes Americans while also helping feed others throughout the world; and to preserve our Nation's natural resources through conservation, restored forests, improved watersheds, and healthy private working lands.

As part of USDA's efforts to achieve these goals, the Department partnered with the Office of American Innovation (OAI) to serve as the lighthouse agency for GSA's IT Modernization Centers of Excellence (CoE). Working as one team, USDA and the CoEs are working to modernize IT across the Department. Phase 1 was a comprehensive Department-wide assessment and planning effort. The purpose of Phase 1 was to determine how to radically improve the way in which USDA designs services and interacts with the American citizens it serves. This transformation is supported by changes in the underlying technology to deliver increased operational efficiency. Phase 2, the implementation/execution phase, entails implementing the agreed approaches defined in Phase 1. This procurement is in support of Phase 2 of the CoE process at USDA.

#### 2.1.1 Fragmented Customer Service Landscape

Historically, USDA's program areas designed and maintained separate communication channels for receiving questions and providing information about their specific programs. As a result, there is a tremendous amount of excellent and well developed material about USDA programs spread across the Department in these program specific information channels. The downside of this approach is that, to get the information they need, USDA constituents have to determine the program that has the information that they need.

Some Mission Areas such as Office of Communications and the Food Safety Inspection Service (FSIS) do have a more mature knowledge management programs. The Office of Communications created a centralized self-help digital information tool called "**Ask the Expert**," operated on an Oracle platform, that is estimated to contain approximately 25% of all knowledge articles throughout USDA--3,300 articles. Since no comprehensive inventory of knowledge based articles across USDA's web sites, service centers and contact centers has been

undertaken, this estimate has not been confirmed. If the number of Ask the Expert knowledge articles is proximate, then a rough order of magnitude of the total number of existing knowledge articles across USDA is 15,000.

The Food Safety and Inspection Service Mission Area has created several knowledge management databases on the Oracle platform to serve their various program areas. Currently, these knowledge management databases are not integrated, but could be integrated because they are on the same platform. The largest of the FSIS knowledge management databases is **Ask Karen** whose content is also present on **Ask the Expert**.

### **2.1.2 OneUSDA: The New Culture and Management Operating Model**

USDA must transform the way that it interacts with all of its customers through a customer-focused and lean management approach called OneUSDA. Under OneUSDA, every single person, customer or stakeholder no matter their rank or background, is treated the same way and has the same great experience and interaction with each and every USDA employee. This is accomplished through teamwork, transparency, consistency, and objectivity in all planning and decisions. Under OneUSDA, USDA employees will not segregate themselves by individual office or agency. Instead, they must recognize how interconnected they are and how the work of one team complements or informs the work of another. Under OneUSDA, the customer's needs are above those of the individual employee, agency, or mission area. This new operating model sets the table for a transformation in how USDA provides customer service.

### **2.1.3 Contact Center Center of Excellence (CoE): Supporting OneUSDA**

In conjunction with and in support of OneUSDA, USDA became the “lighthouse” Federal Department for the new GSA-managed Contact Center Center of Excellence. The Contact Center CoE was created to provide a suite of expertise and offerings to help federal agencies assess, manage, and enhance their customer interaction strategies where they need assistance the most, be it with managing their contact center operations; building self-service tools; leveraging robotic process automation (RPA) and emerging technologies; building internal business processes and systems to manage day-to-day performance; navigating available acquisition solutions; and learning contact center best practices.

The goals of the Contact Center CoE during this phase of our USDA engagement are to:

1. Establish an enterprise wide knowledge management system, CRM, and Content Management Tool to provide consistent information across all contact center, online and in person information centers

2. Establish a USDA agency-wide contact center modernization roadmap (by continuing the initial assessment of the current state and where further opportunities are to optimize)
3. Compile and share contact center best practices, playbook, service level agreements (SLAs) and available acquisition solutions
4. Perform market research and launch “test and learn” projects to identify use cases for emerging contact center and business process technologies.
5. Prepare this solicitation in conjunction with senior USDA executives to procure key deliverables identified in our multi-year roadmap

## **2.2 Vision for OneUSDA Contact Center and the Objectives of the Procurement**

### **2.2.1 Vision for OneUSDA Contact Center**

The vision of the OneUSDA Contact Center is to align with USDA’s vision of USDA as the most efficient, effective and customer focused agency in the government. This requires USDA to provide a single front door for all of its customers to contact for information and services. The customer will have an opportunity to present their question or issue and have their question answered or be directed to the correct office for further assistance. As the new centralized knowledge management system matures, the OneUSDA Contact Center will be able to resolve all Tier 0, Tier 1 inquiries and ultimately to handle many Tier 2 questions. Tier 3 inquiries will continue to be answered by the Mission Area with expertise in that area. Increasing the amount of first contact resolution is paramount in this new OneUSDA environment.

A more immediate outcome of the OneUSDA vision is to shift approximately 30% of current USDA call volume to Tier 0 and Tier 1 giving the USDA staff the ability to focus on complex questions, and provide true Tier 2 and 3 expert services (see Appendix B for Assumptions).

The Government anticipates that the remaining USDA contact centers will be modernized, streamlined and standardized to improve the experience customers get when they are referred to them. The centralized knowledge management system will improve the experience of visitors to the USDA websites through continual content improvements and upgrades based on the integration with the contact center. The ultimate goal is to enable USDA to track what customers are calling about, what the volume is, and the complexity of their questions regardless of the access point used by the customer.

## 2.2.2 Objectives

The primary objectives are to:

1. Improve the customer experience and operational efficiency of contact centers USDA-wide putting USDA on par with the private sector
2. Provide customers with access to USDA information and services via their channel of choice through a single “front door”
3. Provide customers with a one-stop shop through a centralized directory of services and knowledge articles across USDA
4. Institutionalize innovation and continuous improvement through the integration of new capabilities, features and emerging technologies (e.g., AI-based tools) for continuous improvement and innovation
5. Allow USDA to manage contact centers USDA-wide as an enterprise especially in times of emergency when surge capacity may be necessary
6. Provide a foundation for continued modernization, optimization and consolidation of contact centers to continue improving the customer experience
7. Improve operational flexibility by creating an environment that can efficiently and effectively integrate new capabilities and features
8. Facilitate the adoption of the OneUSDA operating model

The Contractor must provide services to assist the CoE in ensuring sustainability of modernization efforts by positioning USDA to take over the modernization efforts from the CoE through activities, such as re-skilling, organizational design, and transition activities.

## 2.2.3 Scope and Deliverables of Procurement

The Contractor must develop an integrated technical and operational solution that produces these foundational deliverables:

### **Task 1 - Design of an omni-channel OneUSDA Contact Center for all of USDA under 1-866-ASK-USDA (or similar phone number).**

USDA requires an omni-channel enabled contact center that initially will handle all Tier 0 and Tier 1 contacts across all USDA agencies via phone, chat, and email. USDA will provide agent staffing for this new contact center. The Contractor must provide the program management team and technology for this USDA contact center. As the new enterprise-wide knowledge management system matures, it is anticipated that this “front door” contact center also should

be able to handle most Tier 2 issues. Complex Tier 2 and 3 issues will continue to be handled by subject matter experts within USDA Mission Areas. The contractor is not responsible for purchasing or maintaining the selected phone number, but must integrate IVR and other technology with USDA's provided phone number.

The term "omni-channel contact center" as used in this contract refers to a contact center that performs all the functions associated with receiving and responding to inquiries, and providing information and services through the use of various communications media, including telephones, chat, email, social media, websites and other digital channels, AI-based virtual intelligent agents, telecommunications devices for the deaf (TDD/TTY), postal mail, and other future devices while having the history of the customer's previous information and inquiries.

Through the OneUSDA Contact Center, USDA will provide a concierge service to customers by either answering their question immediately, routing them to the correct contact within USDA to complete their transaction and/or providing information via email, chat, text, etc. The contractor must design the OneUSDA Contact Center to integrate with all necessary contact centers across USDA, USDA service centers and any other digital platforms required to publish the central knowledge base.

The Contractor is responsible for tracking and handling the contact volumes and workforce schedules of other designated USDA Contact Centers to develop a strategy for addressing anticipated as well as unanticipated surges in contact volume. For surge capability, the Contractor must provide USDA with a scalability plan.

Through the OneUSDA Contact Center, USDA will conduct satisfaction surveys via telephone, email, and chat interactions. The contractor shall develop the surveys, which will include core questions that will also be featured in surveys for all USDA channels, including those beyond the contact center (eg. USDA.gov). The Contractor must collaborate with the Government, analyzing the results and customer feedback from these surveys. The Contractor will implement business process improvements based on customer feedback and results. The OneUSDA Contact Center will participate in a larger USDA Voice of the Customer and Customer Feedback program. USDA's Office of Customer Experience is working with the Customer Experience Center of Excellence to develop an enterprise-wide Voice of the Customer/Customer Feedback program, and will be procuring tools and services to assist in establishing the program in another procurement. The OneUSDA Contact Center will work with the Office of Customer Experience and the Customer Experience Digital Support Services to develop and execute operating level agreements (OLAs) to integrate the contact center with the Voice of the Customer program. The Contractor is responsible for collaborating with and maintaining close relations with these offices.

The OneUSDA Contact Center will feed operational and customer satisfaction data into USDA's newly created executive dashboard and data analytics program. USDA is working with the Center of Excellence for Data Analytics to create an executive dashboard and enterprise-wide data analytics capability. The OneUSDA Contact Center will provide data on key performance and other selected data for inclusion in this new executive dashboard.

## **Task 2 - An enterprise-wide integrated knowledge management solution and content management tool housing Tier 0 and 1 knowledge (with Tier 2 being added over time)**

The Contractor must develop an enterprise-wide integrated knowledge management solution (knowledge management integrated with CRM) and content management tool that will supply consistent, timely and accurate information to all customer touchpoints (i.e., online, phone, service centers, and social media). The proposed USDA knowledge and content management solution must provide USDA customers and personnel access to a directory of services and program information to efficiently locate and obtain accurate information thereby solving the customer's problem at the first touch. Performance SLA's, including first call resolution, will be initiated after the first six months of operation, once a baseline is established.

## **Task 3 - Provide an Organizational Change Management Plan**

The Contractor will deliver a Organizational Change Management Plan that highlights their approach for:

- Facilitating the change associated with moving to the OneUSDA contact center concept and driving user adoption
- Supporting the OneUSDA contact center and enterprise-wide knowledge management system--training of USDA staff, identification of business process changes, assistance in the marketing of the new OneUSDA center, risk management and mitigation plan, etc.
- Reinforcing change management goals and activities once OneUSDA is stood up and at a "steady state" (year 2 activities)
- Helping USDA staff understand their role and the skill sets needed for that role in this new environment.

## **Task 4 - Ongoing innovations program throughout the life of the contract through a continuous improvement program that includes periodic "test and learn" projects**

USDA is committed to implementing emerging and proven technologies that enhance customer service while increasing efficiency. As part of this procurement, the Contractor will propose a strategy and implementation plan for undertaking two "test and learn" projects such as virtual intelligent agents and robotic process automation.

Throughout the life of the contract, innovations in technology, business processes, or economies of scale that will improve the customer experience and/or improve the efficiency of the OneUSDA's Contact Center operations without sacrificing the quality of the interactions. The Contractor must identify how the innovation could save costs or improve satisfaction through improved operations and customer service. For example, leveraging technology that reduces calls that are handled by agents while maintaining the customers' satisfaction could be proposed. When the cost savings occurs, the government and Contractor must share in the savings. The intention is to incentivize the Contractor to innovate to reduce costs and/or calls and share in the savings, [see Value Engineering clause](#).

Appendix A contains a chart that aligns the foundational deliverables with the OneUSDA Contact Center objectives described in section 2.2

## **3.0 Program Requirements**

### **3.1 Best-in-class OneUSDA Contact Center for all of USDA under 1-866-ASK-USDA (or similar phone number)**

The Contractor must work with USDA's Customer Experience Office to create an omni-channel OneUSDA Contact Center that will be able to address all customer inquiries for all USDA programs. The Contractor must (1) develop the concept of operations for the contact center, (2) provide the necessary personnel to perform the contact center project management functions, and (3) Implement the technology stack (which may need to accommodate work from home/virtual agents) including operations and maintenance for the new OneUSDA Contact Center. USDA will provide agents for the contact center, and will determine whether agents will be premise based or will work from home/virtually.

Through the OneUSDA Contact Center, USDA will handle all Tier 0, Tier 1 calls as well as serve as a concierge service to direct Tier 2 and 3 inquiries to the correct person and/or programs. As the knowledge management system matures and technology platforms extend to all contact centers, the OneUSDA Contact Center should be able to address many Tier 2 calls.

The Contractor must develop a concept of operations and technical solution that provides automated, attended, and other support services that addresses the needs of USDA customers. These services must evolve over the course of the contract to meet the changing needs of USDA customers and stakeholders.

The Contractor is responsible for all program requirements described herein, including:



- All necessary PMO personnel, training, supervision, administrative support and management;
- Supplies, equipment, technology stack (must be able to accommodate work from home/virtual agents);
- All telecommunications equipment except what is provided by the Government;
- All software and research and reference materials (except those provided by the Government);
- All technical and management services to support operations;
- Federal and agency information systems security compliance;
- An effective quality control program;
- An automated customer survey capability that can measure customer satisfaction at the end of the interaction;
- A best-in-class data collection and reporting capability

### **3.1.1 Overview of current contact center landscape & assumptions**

The Contact Center of Excellence (CoE) team undertook a high-level assessment of the USDA contact centers and websites from April through June of 2018. While the CoE team continues to conduct more detailed maturity assessments for many of USDA's contact centers, the following general points can be made about the current USDA contact center landscape:

1. There are 24 external facing contact centers of varying size (see Appendix G)
2. Almost all contact centers are staffed by USDA employees (GS 6's and 7's through GS 15's).
3. The estimated total number of annual calls across all USDA contact centers is 2.4 million.
4. Most of the contact centers don't track the complexity of their calls (e.g., no formal historical data on numbers of Tier 0, 1, 2 and 3 calls)
5. Based on experience with other agencies and interviews with USDA staff, it is estimated that 30% of total calls received are Tier 0/1 or approximately 720,000 a year.
6. Most contact centers do not use a Customer Relationship Management (CRM) tool, but several have plans to adopt a CRM tool in the near future.
7. Historical volume trends are not available for many of the contact centers.

Since well documented historical volume trends and contact characteristics do not exist for USDA's contact centers, the Contractor should see the Assumptions table in Appendix B as the starting point for solution development and pricing for the period of performance. Since USDA is providing agents in facilities and/or work from home model, the Contractor should use those assumptions to bid PMO staff and technology requirements.

The Contractor should be prepared to modify operations up or down as baselines are established during the the contract.

### **3.1.2 USDA organizational ownership and governance of the new OneUSDA Contact Center**

The newly created Office of Customer Experience will establish standards for customer experience and contact centers. The OneUSDA Contact Center will report directly to the Office of Customer Experience. Under Government management, the Contractor will provide professional services to support the Office of Customer Experience in developing a governance framework for USDA to manage the Contact Center in an omni-channel environment.

### **3.1.3 OneUSDA Customer Service Work Types**

The contact center must have the initial operational and technical capability to support directory assistance and Tier 0 and 1 general program information contacts during the base period of the contract. As the knowledge management system matures, the contact center should steadily be able to add all Tier 0 and 1 contacts and begin to take Tier 2 contacts. The customer work types that are likely to be required include:

- A. Directory Assistance
- B. Inquiries on specific programs, applications and services
- C. Assistance in completing forms
- D. Outbound contacting of customer segments
- E. Compliance Inquiries
- F. Public Comments
- G. Customer surveys/feedback
- H. Customer screening opportunities
- I. Case management--this work type refers to instances where an immediate response is not available or appropriate, where soft transfers to SMEs are required, or information or research is needed.
- J. Creation of new content and omni-channel delivery mechanisms

### **3.1.4 OneUSDA Contact Center Training Program**

As part of the concept of operations, the Contractor will develop and implement a training delivery program to ensure that contact center staff provide superior levels of customer service in answering inquiries across all customer access channels (See Appendix B & G).

The Contractor will:

- A. Create and execute a contact center training program to address the training of all new personnel and support staff that will support the OneUSDA contact center.
  - a. Develop and provide training to Government contact center personnel on all technology solutions provided by the Contractor.
  - b. Training materials will be updated annually, and posted in designated repository available to USDA employees.
  - c. Training materials developed by the Contractor must be 508 compliant.
  - d. Provide instructor-led training to all contact center agents, and an instructor-led refresher session will be provided annually incorporating changes from the previous year. The Contractor will record the sessions and provide to the USDA in an agreed upon format.
  - e. To develop and refine training materials, the Contractor must have access to Government training materials, standard operating procedures, knowledge articles, and subject matter experts to develop and refine training materials.
  - f. The Government may provide periodic training on changes, new products or services to the Contractor.
- B. Coordinate with the workforce management team to minimize disruptions to operations.
- C. Provide experienced instructors to create and deliver annual training material to supervisors and agents.
- D. Use technology to provide ongoing training updates and other value-added training. The Contractor is expected to stay up-to-date on training methodologies and delivery tools throughout the course of the contract. Ongoing continuous training modules must address new information, coaching topics, and specialized topics to be addressed based on the Government's feedback. Train the trainer model is the preference.
- E. Create all training materials needed to successfully complete both hard and soft skill training.
- F. Training materials created by the Contractor must be nonproprietary, submitted to the Government for their unlimited use in editable and electronic format, become property of the Government upon delivery and in a format that can be utilized by and with USDA training system.
- G. Develop and implement training on how to work within/use the Knowledge Management solution and tool.
- H. Ensure all training materials support the goals and objectives of the OneUSDA program.
- I. Includes all training modules and lesson plans needed to onboard new agents, to ensure that agents understand all program goals and objectives, and accurate coding used to document all interactions. Training must include IT security.

### **3.1.5 Reporting Capabilities**

Contractors must utilize existing reporting systems that are capable of accessing and combining data from all of their operating systems, including, but not limited to, the ACD, dialer, CTI, CRM, sales, retention, IVR, recording, QA, workforce management, speech analytics, and others, on a real-time and historical basis. (See Section 8 for reporting frequency). Specifically, USDA is expecting the following reporting capabilities from the Contractor:

1. Collect and consolidate data from all internal contact center systems and feed that data into the USDA's data collection tools used to support its enterprise-wide reporting and dashboard program without investing in expensive integration projects
2. Create both real-time and historical reports
3. Produce both reports and dashboards
4. Have a single system of record that generates reports in sync with their feeder systems
5. Present the data in any format required by USDA to report on KPIs
6. Schedule, produce and distribute reports and dashboards in deliverable schedule below to appropriate CoE and USDA staff
7. Allow various user groups, including USDA staff, to see different reports and/or data that are relevant to their specific function
8. Create rules to issue alerts when a specific metric or KPI falls out of compliance
9. Create a permissions-based environment that limits data access as needed

### **3.1.6 OneUSDA Technical Capabilities**

The Contractor must provide all technology, technical applications tools and support services necessary to meet all requirements specified in this SOW (See Operating Information, Appendix B and Technical Requirements, Appendix C & D ). More specifically, the technology and software solution must be commercial-off-the shelf (COTs)-based, current, and allow for all data to be transitioned to a different COTS technology platform, in a format agreed upon with USDA, within a six month period if required in a future contract transition out process .

The Contractor must provide sufficient technical capability and capacity to support potential growth in Tier 0 and 1 and eventually Tier 2 contact volumes through all channels (i.e., phone, chat, email, social media, web inquiries), workload estimates, and call routing in accordance with service level agreements.

The Contractor must provide sufficient expansion capacity to accommodate changes in call patterns, surges (i.e., anticipated and unanticipated) not only for the OneUSDA Contact Center but also for other USDA contact and service centers as determined in conjunction with USDA.

This will be measured by ability to handle an increase in volume, including surge, without decrement in service levels and performance on KPI's. It is anticipated that once the OneUSDA Contact Center is operational, other USDA contact centers and service centers will begin to provide volume forecasts and schedules to the Contractor's workforce management team so that they can begin to build forecasts and scheduling requirements across all USDA contact centers. This consolidated forecast and scheduling model will enable USDA to better anticipate surges and for the OneUSDA contact center to provide surge support for other USDA contact centers.

The Contractor must provide and maintain a secure, highly available, scalable, 508 compliant, and omni-channel technology infrastructure. The Contractor also must ensure that any cloud-based applications or tools, such as a Customer Relationship Management System (CRM), are hosted in an environment that is FedRAMP certified, and USDA authorized, or capable of achieving certification within 6 months in accordance with USDA and Federal Security policies and directives, these requirements and directives can be found here: <https://www.ocio.usda.gov/policy-directives-records-forms/directives-categories>. The Contractor must ensure that technical systems are usable by both Contractor personnel and authorized federal staff, where appropriate. The service must provide both remote and onsite access. For contractor operated systems, adherence to NIST 800-171<sup>1</sup> will be required, and security assessment will be part of achieving initial operating authority, see [directive](#), Acquisition Guidance, Section 5, page 3.

### **3.1.6.1 Technical Requirements to Facilitate Operations**

The Contractor must provide automated, attended, and other support services to meet the operating requirements of this SOW. These technical services that support operations must evolve to meet the needs of USDA for the duration of the period of performance.

Technical services that support operations in this SOW include:

- Automated Services--the Contractor must provide automated services to enable USDA to deliver unattended service 24 hours a day, 7 days a week (i.e., 24 X 7). The Contractor must be responsible for the provision, maintenance, design, implementation, operation, and management of these services.
  - ❑ Automated Voice Response Service
  - ❑ Automated Callback (Telephone channel)
  - ❑ Web Callback ( enables customers visiting websites and chat to access the callback service)

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<sup>1</sup> <https://nvlpubs.nist.gov/nistpubs/specialpublications/nist.sp.800-171r1.pdf>

- ❑ Automated Outbound Dialing
- ❑ Automated Email Delivery
- Inbound Telephone Inquiries
- Outbound Telephone
- Web Chat Inquiries
- Text Messaging
- Social Media Inquiries
- Email
- Voice Assistants and API integration

Minimum requirements for all technical operating capabilities are contained in Appendix C.

### **3.1.6.2 Technical Infrastructure Requirements**

The Contractor must provide the technical infrastructure that includes inquiry processing technology and services, email and web chat routing and management system, knowledge management system, contact management system, workforce management system, customer survey automation, compliment and complaint management system, service monitoring and quality control systems, training, etc.

- General Infrastructure Requirements
- Call processing Technology and Services
- Call routing and distribution
- Computer Telephony Integration (CTI)
- Automated Systems Capability
- Dialed Number Identification Service (DNIS)
- Call Queuing
- Call Transfer
- TDD/TTY calls
- Customer Relationship Management solution (CRM)

Minimum requirements for following components of the technical infrastructure can be found in Appendix D. Please note that USDA will supply desk-tops.

## **3.2 An Enterprise-wide Integrated Knowledge Management Solution and Related Tools**

The Contractor must complete discovery, design, build, test and populate a single enterprise wide knowledge management solution and related tools (e.g., CRM, content management tool, integrated portal) that will enable the distribution of consistent, accurate, and timely information

to USDA constituents across all channels (e.g., walk-in service centers, websites and other digital properties, and contact centers). A comprehensive knowledge/content management system is foundational to an integrated USDA omni-channel strategy (i.e., consistent and accurate first responses regardless of whether the information is obtained through a visit to any of the approximately 3,200 walk-in service centers, calls to the 27 contact centers, see Appendix G: Inventory of External-Facing Contact Centers at USDA, or through any website and other digital assets.)

### **3.2.1 Phases for Creating Enterprise-wide Integrated Knowledge Management System**

The Contractor must complete discovery, design, build, test and oversee the population of an enterprise-wide knowledge management system and content management tool through three phases as outlined below. The Contractor must ensure that a process is established to ensure the ongoing currency of knowledge articles.

#### **3.2.2.1 Phase 1: Discovery & Design**

The Contractor must develop and execute an agile discovery process to assess the information needs of USDA customers and stakeholders; what information articles and FAQs currently exist; how best to collect and create knowledge articles to build a robust, scalable and flexible knowledge management system; and a recommended sequence of rolling in existing knowledge articles.

The Contractor must submit its design recommendations to the Office of Communications and the Office of Customer Experience for review and authorization. The Contractor may propose a design solution that expands the current Oracle knowledge management platform to an enterprise-wide level, or a design of a new system on a different platform.

The Contractor must provide a document summarizing any changes associated with architecture and design of the knowledge management system.

#### **3.2.2.2 Phase 2: Build & Test**

The Contractor must build out a centralized platform that leverages current knowledge articles, migrates knowledge in a standardized format, and creates a scalable searching metadata structure using an agile based development process that is consistent with USDA system development requirements and standards set by the Cloud Platform team. Work products and other deliverables should be delivered in accordance with the Contractor's proposed development methodology unless otherwise directed by USDA.

The Contractor must conduct performance testing of interfacing systems, and resolve any issues identified during performance testing. The Contractor must document defects found during testing in accordance with USDA's test management standards. The Contractor must maintain a log to track and record defects, assign a severity level to defects, and create an action plan to resolve the issue.

The Contractor must develop a configuration management plan (due with the Knowledge Management Plan) for the knowledge management system in accordance with the Contractor's and USDA's system management methodologies. The configuration management plan must define the configuration items, establish and document the configuration management processes and controls, establish release baselines/documentation, establish a verification process, and other areas of configuration management governance. Knowledge management software, code, frameworks, related COTS tools, and other layers and components of enabling and supporting technology will evolve as part of standard technology refreshment (i.e., evergreening) and best practices.

### **3.2.2.3 Phase 3: Populate**

The Contractor must propose a recommended approach and implementation plan for consolidating knowledge across USDA (due as part of the Knowledge Management Plan). That plan will contain the following policies and procedures:

- A template for knowledge articles
- Establish a process for flagging issues for the knowledge base
- Establish standards for writing effective knowledge base articles and content,
- Identify a knowledge management "owner" within each Mission Area and program area who will (a) be responsible to ensure compliance with all knowledge management requirements, and (b) determine who will write content for the knowledge base within the programs housed in the Mission Areas
- Establish efficient and quick turn technical reviews before content is published
- Establish a process where the OneUSDA Contact Center, Service Centers, and other customer-facing personnel can notify a central contact that an information gap in the knowledge management system has been identified.

The Contractor must work with the COE BMO, Office of Communications, the Office of Customer Experience, and the Mission Areas to establish a knowledge article migration strategy and schedule (due as part of the Knowledge Management Plan). The knowledge article migration strategy should prioritize the transfer of current and accurate existing information, and then lay out a plan to address identified knowledge gaps.



### **3.2.3 Maintaining Currency--- Creation and Administration of a Training Program**

The Contractor must create and administer a user training program for USDA staff that will have responsibility for creating and maintaining knowledge articles and other content related to their program. The scope of the training will be how to use the knowledge management system, a review of all USDA knowledge management standards and standard operating procedures (SOPs), and how to write effective knowledge articles. See Appendices B and G for assumptions.

It is anticipated that once USDA personnel are trained, USDA staff will assume the primary role of creating and entering knowledge management articles. The Contractor must oversee this population phase for the first 3 months.

### **3.2.4 Knowledge Management System and Related Tool Requirements**

The Contractor must provide all technology, technical applications tools and support services necessary to meet all knowledge management requirements specified in this contract. More specifically, the technology and software solution proposed by the Contractor must be omni-channel capable, COTS based, current, and allow for all data to be transitioned to a different COTS technology platform.

Minimum Requirements for the following Knowledge Management System can be found in Appendix E.

- Platform Requirements
- Customer Experience Tools to enable Customer Self Help
- User Requirements
- Administrative Requirements
- Search Capability Requirements
- Document Management Requirements

## **3.3 Organizational Change Management Strategy**

The Contractor must develop and implement an Organizational Change Management strategy and program that drives adoption of the OneUSDA Contact Center. The Contractor must collaborate with multiple stakeholder groups and organizations within USDA to create effective organizational change management approaches and continual improvement programs to “institutionalize” cultural transformation, obtain staff buy-in, and ensure that both technical and operational improvements are anticipated over the term of the OneUSDA Contact Center

contract and beyond. The Contractor must work in close collaboration with the COE Business Management Office (BMO) in ensuring that the OneUSDA Contact Center's OCM strategy and program align to the COE's enterprise OCM strategy and plan.

The Contractor must deliver a Organizational Change Management (OCM) Plan that highlights their approach for engaging all stakeholders, from the COE BMO who has overall responsibility for all COE activities during Phase II, the Office of the Chief Information Officer (OCIO) who has responsibility for the technology, to the Office of Communications (OC) who has responsibility for the knowledge base and websites, and the Office of Customer Experience (OCE) who has responsibility for the customer strategy and improving the overall customer experience. The OCM Plan could include identifying and managing risks; communicating across leadership, managers, and front-line staff; and shifting incentives, expectations and culture. The Contractor's OCM Plan must include, but not be limited to the following: Stakeholder Analysis, Change Impact Analysis, Communications Plan, Training Recommendations and Approach, and Reinforcement Strategy.

The Contractor must communicate with all USDA officials that touch external customers to ensure that customers know how to contact USDA, employees know where to get information to assist customers, and all public-facing materials are updated with a new contact number if they need it. As content is identified and migrated to a new knowledge base system, the Contractor must work with stakeholders to ensure the content is easily understood and can be used by the website, contact centers and service center officials.

### **3.3.1 Change Management Training Plan**

The Contractor must work with USDA's overall change management program management office and USDA executives to help design and create a change management training program and the content for that training program. The Contractor shall recommend effective training approaches and delivery mechanisms. Please see Appendices B and G for assumptions.

## **3.4 Ongoing Innovations Program**

Throughout the contract period of performance, the Contractor must propose innovations in technology, business processes, or economies of scale that (1) will improve the customer experience, (2) improve the efficiency of operations, and (3) support future phases of the OneUSDA contact center modernization roadmap. Must be in accordance with [Value Engineering clause](#).

The Contractor must incorporate innovations that are agreed upon by the Government throughout the course of the contract that (1) includes "test and learn" projects that evaluate use cases for the potential adoption of technical tools, business process re-engineering initiatives,

and operations and staff development enhancements; (2) planned upgrades in technology, (3) operations improvements; and (4) benchmarking with appropriate Federal and commercial organizations.

### **3.4.1 Required “Test and Learn” Projects Included in this Initial Scope of Work**

The Contractor must propose an approach on implementing “test and learn” innovation projects. Realistic examples include:

- A. A “test and learn” project utilizing virtual agent technology in the OneUSDA contact center. The project would evaluate the cost/benefits and user receptivity of a virtual intelligent agent technology use case within this new OneUSDA contact center.
- B. A “test and learn” project utilizing robotic process automation (RPA) in any of USDA’s mission areas except for the Office of Financial Services. The project would evaluate the cost/benefits and user receptivity of a robotics automation processing use case for a USDA business process.

The Contractor’s “test and learn” project proposals must:

- A. Define Use Case for the “test and learn” project
- B. Goals of the “test and learn” project
- C. How will success be determined (e.g., Success Measures and Benchmarks)
- D. Propose a test pool of contacts
- E. Propose a timeline for the “test and learn” project
- F. Describe the Methodology for testing the use case
- G. Describe the feedback mechanism used to track and measure performance against goal
- H. If the “test and learn” project is successful, describe a high level approach for incorporating it in ongoing operations.

The timing of the two, at a minimum, required “test and learn” projects may occur at any time within the period of performance, with agreement from the Contractor and the Government regarding timeframe, cost and scope of “test and learn” projects. Must be in accordance with [Value Engineering clause](#).

### **3.4.2 Training**

The Contractor shall provide training to USDA staff, if required, to undertake the test and learn projects proposed. Please see Appendix B and G for assumptions.

## 4.0 General Requirements

In addition to specific scope requirements described in this SOW, the contractor must:

- Maintain all work products on the CoE Google Team Drive or other specified location within the CoE Google Drive.
- Utilize Trello for day-to-day agile task tracking and MS Project for a project schedule management.
- Develop and maintain a detailed project schedule, including a Work Breakdown Structure (WBS).
- Conduct scrum/Agile development rituals and utilize the appropriate tools to foster an agile environment.
- Develop artifacts in support of sustained modernization efforts by USDA after the contract period of performance has ended, including proposed organizational structures, training materials to re-skill USDA staff, and standard operating procedures.
- Participate in and contribute to the CoE Business Management Office (BMO) status reporting activities, such as the weekly status report to USDA and program status review once every other week
- Integrate with the GSA/USDA CoE BMO to support the program oversight mechanisms, organizational change protocols, risk escalation, and communication.
  - Support the generation and delivery (electronic and hardcopy) of status reports, executive level briefings, talking points, emails, and other communication materials.
  - Contribute to the updates to the CoE website in coordination with the CoE BMO.
  - Contribute to and participate in the CoE BMO status and project review meetings.
  - Manage and escalate project risks to the CoE BMO and USDA leadership.
- Collaborate with the COE Business Management Office (BMO) to create and implement an effective organizational change management strategy and program to facilitate and drive adoption.
- The primary place of performance will be at Government facilities within the Washington, DC metropolitan area.

## 5.0 Phase-In Activities

The Contractor must develop and execute a Phase-In Plan (due 10 days after award) that maps the dependencies among deliverables specified in this SOW, and provides a resource-loaded Work Breakdown Structure and timeline for each deliverable and its impacts on the others.

The Phase-In Plan must include the following:

- A. Site-specific actions (i.e., USDA will determine site), methodologies, clearly defined processes, detailed schedules with realistic milestones (WBS), and specific actions need to ensure the completion of phase in activities as described above.
- B. Detailed risk analysis and mitigation strategies to minimize completion of the phase in
- C. Key events and critical milestone dates
- D. Recommended parallel operations with existing USDA contact centers as well as any requested involvement or impacts on services being provided
- E. Information or data required from USDA
- F. Detailed operational readiness checklist to determine phase-in completeness and facilitate sign-off by USDA prior to full operation status

The Contractor must complete the following activities within a 120 calendar days to phase in the new contact center which commences after commencement of work:

- A. All Required Management Plans as described in section section 12, “Deliverables to be Provided after Award”.
- B. All Phase 1 Discovery and Design activities of the Knowledge Management System Deliverable including a strategy and timeline for sequencing of knowledge content to be incorporated into the OneUSDA knowledge base.
- C. All activities required to operationalize the new omni-channel OneUSDA Contact Center. Phase in completion includes working with USDA to determine the facility, or work from home infrastructure, telecommunication connectivity requirements, technology stack, train USDA agents, reporting capabilities, and any other activities required to commence contact center operations. Phase in completion will require the Contractor to work with USDA to determine what initial level of information support, in addition to directory assistance, the contact center will be able to provide during the development of the enterprise-wide knowledge management system. It is anticipated that the Contractor will be able to access and utilize Tier 0 and 1 information that currently exists in digital self help tools such as Ask the Expert and Ask Karen.
- D. Changes to all digital properties to ensure that the 1 866 ASK USDA number is visible.
- E. Training Program for agency personnel on the transition of Tier 0 and 1 information to the new OneUSDA Contact Center and the agency’s role after phase in.
- F. Identification of the 1-800 numbers that will be retired and retirement timeline.
- G. Communication recommendations to internal staff and external stakeholders and customers about the new knowledge management system, contact center capabilities, and change management program.

Based on the Contractor’s proposed solution the “test and learn” projects may be launched during phase in, or later after operations are baselined and the knowledge management system is completed.

The Contractor must coordinate and support regular phase in status meetings with USDA senior managers. During such status meetings, the Contractor, at a minimum, will present to USDA accomplishments, issues, and potential risk areas.

The Contractor must recommend whether the Program Manager or a dedicated Phase In Manager will be responsible for transition integration and completion. The Manager responsible for transition will be responsible for maintaining continuity of information services and quality of services provided and will be expected to become familiar with USDA policies, processes, technologies, and services.

The Phase-In Plan should be submitted within 10 days of award (see section 12, "Deliverables to be Provided after Award"). A summary of the Contractor's phase in approach should be presented as part of the management section of the Contractor's proposal.

## **6.0 Contract Phase-Out (Transition Out)**

The contractor is responsible for successful transition to a successor organization, which may be a vendor or USDA office. During the transition to the Government, or a new Contractor, the Contractor must perform all necessary transition activities, including:

- (1) Minimal interruption of contracted services to the BMO and other customers during transition period;
- (2) Participation in meetings with the Government or new Contractor to effect a smooth transition and provide detailed information on the operation of all deliverables, at CO/COR and the Lead's discretion;
- (3) Handoff from contractor resources to replacements, either Government or new Contractor, during transition period consistent with the transition plan;
- (4) Any other knowledge transfer activities necessary for a full and complete transition to any successor organization; and,
- (5) All transition documentation must be delivered to USDA in MS Office Suite format.

## **7.0 Change in Delivery Model, and Expansion**

We expect that changes in technology will occur, which is subject to approval by the Government. The Contractor must seek and obtain approval from USDA prior to significant design changes in operations model.

The Contractor must ensure that there will be no degradation of service during change of service delivery model.

## **8.0 Program Management Requirements**

The Contractor must provide a comprehensive Program Management Plan (due within 90 days of award) that addresses program management, integration activities, and oversight required to implement and operate all contract deliverables.

The Contractor also must ensure that all standard operating procedures are maintained and updated when significant process or program changes occur, but at least on a regular interval agreed upon between the Contractor and USDA. The vendor is responsible for creating SOP's for the technology components. USDA is responsible for creating SOP's for the contact center, in collaboration with Contractor.

### **8.1 Organizational Structure**

The Contractor must create an organizational structure, including clear lines of authority for key personnel. The Contractor must create roles and responsibilities and delegations of authority for all of its program staff to ensure accountability for performance and the achievement of USDA customer service and lean management objectives.

### **8.2 Staffing Approach**

The Contractor must provide qualified management personnel and having the appropriate subject matter expertise to perform USDA requirements successfully based on the technical solution and concept of operations proposed by the Contractor.

#### **8.2.1 Key Personnel**

The Contractor must have the capability to provide qualified personnel to meet the specific requirements of this SOW. At a minimum, the Contractor must provide the following key PMO functions:

**Program Manager** - responsible for managing and implementing the overall contract requirement and oversee implementation of more complex tasks; organizes, directs, coordinates planning, and implements all contract; interacts with high level program officials regarding issues and status of the contract; coordinates financial and staffing resources; monitors and analyzes contract and performance data and reports results to Government officials; manages the activities of subcontractors; and reviews contract, operations and management reports. The Government reserves the right to approve the selection of the

Contractor-assigned Program Manager prior to his/her placement in supporting the contract if such assignment is warranted.

**Operations Manager for Contact Center** - Responsible for working with USDA executives and the Contractor's PMO team to develop a concept of operations; create all operating, quality, and training statements of policy and procedure needed to operate a best in class contact center; stand-up the contact center; stabilize contact center operations; and transition operations to a USDA based PMO team. The Operations Manager will provide daily operational support of the contact center during the stand up and stabilization periods; oversee training, service delivery; handle problem escalation and resolution; monitor performance; provide oversight of the planning, design, installation, modification, and operation of telecommunications and information systems capabilities; and ensure that all functions and processes are implemented and operated properly. The Operations Manager will work with USDA's Office of Customer Experience to develop a detailed transition to USDA management plan and will be responsible for successfully executing the transition process.

**Knowledge Management Project Manager**-- Responsible for successfully designing, building, testing, and populating of the new USDA Knowledge Management system described in section 3.2. The Project Manager for the Establishment of the Enterprise-wide Management System will manage all Contractor personnel involved in the project; establish frequent and effective communication and reporting processes with USDA Communications and CX executives and designated knowledge management leads within each of USDA's Mission Areas; draft statements of policy and procedure to insure a best in class knowledge management system; conduct training to designated USDA staff on the technology and operational SOPs of the new knowledge management system; provide support in integrating the new knowledge management system to the OneUSDA contact center and all other USDA contact centers, websites, and social media properties. The Project Manager will also work with USDA executives on a strategy to transfer all operating responsibilities to USDA when the system is operational and stabilized.

### **8.2.2 Support Personnel Functions**

The Contractor shall provide sufficient qualified support staff to perform functions and deliverables that are outlined in Section 3.0 Program Requirements.

### **8.3 Contingency and Disaster Recovery (for Contractor Provided Technology & Equipment)**

The Contractor must develop and implement a contingency/disaster recovery plan and procedures to address continuity of operations in the event of a lapse of service for any reason.



This plan must include both continuity of support for short term disruptions (i.e., less than 48 hours). This plan should include a business impact analysis (BIA) to identify the activities, resources, and procedures needed to carry out operations of all deliverables identified within the scope of the contract during specified business hours. The Contractor must ensure that guidance is in place for the recovery of system and operations components during short-term periods of interruption to normal operations.

#### **8.4 Quality Control Program**

The Contractor must develop, implement, and manage a Quality Control Program for the OneUSDA contact center to ensure that the performance of the contact center adheres consistently to best in class quality standards. The Contractor must develop a Quality Control Plan, which at a minimum, addresses access for random remote monitoring across all channels, performance monitoring and evaluation criteria for each channel, calibration policies and procedures with USDA, effectiveness of service delivery, analyzing variances among agent performance, a plan for improving quality, surveys and focus groups for customer satisfaction, and internal quality oversight of all channels.

The Contractor must perform, at a minimum, a random recording of at least 2% of the inquiries for each channels every month and make those recordings available to USDA for random selection during USDA quality monitoring and calibration sessions. After 90 days, the Contractor will delete the recording.

USDA would like to participate in weekly calibration sessions with the Contractor during the first six months immediately following the completion of transition activities. As the Contractor gains more experience in responding to inquiries, USDA and the Contractor can discuss the reduction of calibration sessions and/or adjust the monitoring evaluation baselines and thresholds.

USDA expects the Contractor's Quality Control Program and Plan to reflect best industry practices and provide for ongoing quality improvement innovations.

The Contractors Quality Control Plan must be submitted to USDA 90 days after award.

#### **9. Key Performance Metrics and Standards**

Performance SLA's, including first call resolution, will be established after the first six months of operation once a baseline is established and must be agreed upon by the Government and Contractor. The Government understands that initial months of the contract will involve extensive training and coaching of staff to reach optimal performance on all channels. The table

below outlines our ideal key performance metrics and levels for the operation of the OneUSDA Contact Center.

Key Metric	Calculation	Measurement Window	Required Performance Level
CSAT	CSAT based on Likert scale 1-5 rating. (1 low/5 high)	CRM survey after transaction is completed	88%
First Call Resolution	% of contacts resolved during the first contact/contacts received and answered	Monthly	80%
Service Level	% of total contacts that are answered within 20 seconds or less/total contacts	Monthly	80% in 20 seconds
Service Consistency	% half hour intervals that do not meet service level requirements & report the service levels for those intervals	Monthly	<10%
Abandon Rate	# of calls that are disconnected by the customer prior to being answered by an agent within the 20 second ASA period (excludes IVR Calls/Total call offered to agents (excludes IVR Calls) *100	Monthly	<3%
Self-Service Accessibility	% of self-service interactions that are begun and completed without the intervention of a live agent/# of self-service interactions initiated	Monthly	80%
Nature of Call	Directory Assistance, Information Request, Transaction or Service	Monthly	Track

	Request, Special Assistance (Track the Issue)		
Contact Volume by Channel	# Contacts by channel/total # of contacts	Monthly	Track
Forecast Accuracy	(Actual contact volume-forecasted call volume)/forecasted volume	Monthly	>80%

## 10. Deliverables to be Provided

### 10.1 General deliverables

The following deliverables are required for all CoE-related work, due on the dates indicated in the table below:

Deliverable	Description	Due Date	SOW Reference
<b>Initial Work Plan</b>	Should provide a transition plan to take us from current state to new state as well as what tasks will be undertaken to arrive to that new state.	<i>NLT ten (10) days of PoP start date</i>	2.1
<b>Phase In Plan</b>	A plan that maps the dependencies among deliverables specified in this SOW, and provides a resource-loaded Work Breakdown Structure and timeline for each deliverable and its impacts on the others.	<i>NLT ten (10) days of PoP start date</i>	4.1
<b>Project Schedule</b>	A plan detailing the activities, schedule, resources to implement the assessment recommendations and SOW tasks. Microsoft project is preferred.	<i>Within 30 days of PoP start date; updated plan submitted 5 business days prior to month end</i>	2.1

<b>Quality Control Plan</b>	A plan detailing quality procedures to be followed and implemented by the Contract team.	<i>Within 30 days of PoP start date</i>	<i>9.1, 3.4</i>
<b>Contingency and Disaster Recovery Plan</b>	Plan that includes procedures for ensuring continuity of operations in the event of a lapse of service for any reason.	<i>Within 60 days of POP start date</i>	<i>8.3</i>
<b>Organizational Change Management Plan</b>	Details approach for facilitating change associated with moving to the OneUSDA contact center concept and new knowledge management solution; driving user adoption; reinforcing goals and activities; understanding roles and skillsets needed.	<i>Within 90 days of PoP start date</i>	<i>3.3</i>
<b>Program Management Plan</b>	A plan that includes concept of operations and technical solution.	<i>Within 90 days of PoP start date</i>	<i>3.1</i>
<b>Training Plan</b>	A plan detailing the training of USDA staff for contact center operations, knowledge management solution, change management and test and learn projects (if applicable).	<i>Within 90 days of PoP start date</i>	<i>3.1.4</i>
<b>Enterprise-wide Knowledge Management Plan</b>	Will include configuration management plan, recommended approach and implementation plan for consolidating knowledge across USDA; and knowledge article migration strategy and schedule.	<i>Within 120 days of PoP start</i>	<i>3.2-3.2.4</i>
<b>Monthly Status Report</b>	Brief synopsis of the contract team's activities, accomplishments, and risks.	<i>The 15th calendar day of the month following the reporting period.</i>	<i>3.1</i>
<b>Monthly Labor Hour Report</b>	Detail hours billed by resource to each task requirement and projected for remainder of performance period	<i>Shall be included as an appendix to the monthly status report</i>	<i>3.1</i>
<b>Project Close</b>	Develop a closeout report including a	<i>30 days before</i>	<i>3.1</i>

<b>Out Report</b>	summary of milestones and achievements completed over the period of performance to include a deliverables table, risk register recap, lessons learned summary, and recommendations for the continuation of these support services. Report should also include a financial summary of contract funding obligated against the total invoiced.	<i>end of Period of Performance</i>	
<b>Transition Plan</b>	A plan detailing the support activities, milestones, artifacts to transition work from CoE to USDA.	<i>90 days before end of Period of Performance</i>	3.1
<b>Sustainment Artifacts</b>	Documents for USDA to sustain CoE effort post contract end; includes, but not limited to Proposed organizational structures, standard operating procedures	<i>NLT 90 days prior to contract end</i>	2.1
<b>Program Status Reviews</b>	Participate in and contribute to the Program Status Review report and meeting which focuses on the status of the team's schedule, risks, and activities	<i>Bi-weekly</i>	2.1
<b>Training Materials and Reskilling activities</b>	Contribute to the development of training materials and reskilling activities. Materials format (i.e. video, document, pilots, etc.) may vary and will be agreed upon with the CoE BMO	<i>As defined in the agreed upon Project Plan</i>	2.1

#### 10.1.1 Contractor submission

Deliverables are to be transmitted electronically, via email to designated Government officials.  
All deliverables must be produced using Google G Suite or Microsoft Project.

#### 10.1.2 Government review

Government personnel will have 10 workdays to review deliverables and resubmissions and provide written acceptance/rejection.

#### 10.1.3 Deliverable and Data Rights

All test materials, documents, notes, records, software tools acquired, and/or software modified or produced by the Contractor under this contract shall become the property

of the U.S. Government, which shall have unlimited rights to all materials and determine the scope of publication and distribution. The Contractor shall be required to deliver electronic copies of all documents, notes, records and software to the Government quarterly and upon termination of the contract services or expiration of the contract period.

#### 10.1.4 Monthly invoice

The Contractor must provide a monthly invoice to be submitted simultaneously with the monthly status report. The invoice shall include but not be limited to:

- (1) Labor hours expended. The labor hours expenditure information shall include the identification of the employee name, labor category, hourly labor rate, and total number of labor hours expended.
- (2) Timecards. The Contractor must provide a copy of each employee's time card/sheet. The timesheet must identify the Contractor employee name and number of hours claimed per day.
- (3) Supporting documentation for travel costs. Invoices including travel costs shall include supporting documentation as required by the Federal Travel Regulation (FTR) (receipts for all costs \$75.00 or greater).
- (4) Invoice submissions including travel costs shall include completed travel expense sheets for each trip for each employee. The Contractor must comply with line item (per individual positions) billing requests.

#### 10.1.5 Monthly status report

Monthly status reports must include status of work definition forms, schedules, deliverables, current and cumulative task funding status (direct labor and travel funding status to be reported separately as required), risks and risk mitigation techniques, outstanding issues, and proposed resolution approaches and actions to resolve any outstanding issues. The report must identify milestones and deliverables completed and progress towards major milestones and deliverables. The report must identify activities and deliverables planned but not completed including the government acknowledgement and approval of the incomplete work. Status of work definition forms shall include a summary description and schedule of all work definition forms completed during the reporting period, all work definition forms currently on-going during the reporting period and all known work definition forms assigned for future reporting periods. The monthly invoice must be submitted simultaneously with the monthly status report.

#### 10.1.6 Past performance information

In accordance with FAR 42.15 Contractor Performance Information, past performance evaluations shall be prepared for each task order that exceeds the simplified acquisition

threshold placed against a Government-wide Acquisition Contract. For severable task orders, interim evaluations will be required prior to exercising any option periods. For non-severable task orders, evaluations must be collected, coordinated and reported upon completion of the task order.

The Government will provide and record Past Performance Information for acquisitions over \$150,000 utilizing the Contractor Performance Assessment Reporting System (CPARS). The CPARS allows Contractors to view and comment on the Government's evaluation of the Contractor's performance before it is finalized. Once the Contractor's past performance evaluation is finalized in CPARS it will be transmitted into the Past Performance Information Retrieval System (PPIRS).

Contractors are required to register in CPARS, so Contractors may review and comment on past performance reports submitted. Contractors must register at the following websites:

CPARS: <http://www.cpars.csd.disa.mil/>

PPIRS: <http://www.ppirs.gov/>

#### 10.1.7 Closeout

The Contractor must submit a final invoice within forty-five (45) calendar days after the end of The Performance Period. After the final invoice has been paid the contractor must furnish a completed and signed Release of Claims to the Contracting Officer. This release of claims is due within fifteen (15) calendar days of final payment.

## Appendix A: Alignment of Foundational Deliverables and the OneUSDA Contact Center

	Best-in-class OneUSDA Front Door Contact Center	Enterprise-wide KMS & CM Tool	Organizational Change Management	Innovations Program
Improve the customer experience and operational efficiency of contact centers USDA-wide putting USDA on par with the private sector	X	X	X	X
Provide customers with access to USDA information and services via their channel of choice	X	X		
Provide customers with a one-stop shop through a centralized directory of services and knowledge articles across USDA	X	X	X	X
Institutionalize innovation and continuous improvement through the integration of new capabilities, features and emerging technologies (e.g., AI-based tools)	X	X	X	X
Allow USDA to manage contact centers USDA-wide as an enterprise especially in times of emergency when surge capacity may be necessary	X	X		



Provide a foundation for continued modernization, optimization and consolidation of contact centers to continue improving the customer experience	X	X	X	X
Improve operational flexibility by creating an environment that can efficiently and effectively integrate new capabilities and features, continuously improve and innovate, and adjust to stay in compliance with changing federal rules, regulations, and laws	X	X	X	X
Drive greater operational efficiency, reduce complexity, improve stability, and resiliency.	X	X	X	
Facilitate the adoption of the OneUSDA operating model through training programs	X	X	X	X

## Appendix B: Base Period Assumptions for the OneUSDA Contact Center

Drivers	Assumption
Total # of estimated annual Tier 0 and 1 contacts in one year (i.e. 30% of total contacts received through contact centers)	720,000
Total # of estimated annual calls (Tier 0,1,2,3)	2.4 million
Contact Variability in a one year period	Assume straight line allocation of contacts across months
Calls requiring bilingual agents (Spanish)	10%
Total average handle time per call	3.5 minutes to address Tier 0 and 1 general questions (i.e., estimated number of Tier 0/1 contacts is 720,000). Directory Assistance requests (i.e., transferring calls to another USDA contact center) will require much less time.
Hours of Operation	<p>Attended services are required 8:00 A.M through 8:00 P.M. EST Monday through Friday</p> <p>Attended services are not required on Federal holidays or weekends</p> <p>Automated services (e.g., Interactive Voice Response, virtual intelligent agent tools, or chatbot) must be used to provide unattended service 24 hours a day seven days a week.</p>
Escalation	Agents must warm transfer contacts to the appropriate Tier 2 or Tier 3 USDA resource to ensure that the contact center meets the 80% first contact resolution requirements
Channels	The Contractor must develop a channel strategy that moves USDA to an omni-channel environment by the end of the contract. The Contractor must construct their channel strategy to enable USDA customers to transfer to a live agent from any channel.
Contact Forecasting for all USDA contact centers	The Contractor must include sufficient Workforce Management resources to track and analyze all USDA contact centers (i.e., all remaining Tier 2 and Tier 3 contact centers as well as the new OneUSDA Tier 0 and 1 contact center). The Contractor is expected to create a consolidated forecast plan for the entire USDA contact center environment to help identify potential surges and to plan staffing options for surges.

## Appendix C: Technical Requirements to Facilitate Operations

Feature	Requirements
Automated Voice Response Service and Maintenance	<ul style="list-style-type: none"><li>• The contractor must provide qualified personnel to develop and regularly maintain call flow and messages for automated voice response services in keeping with the current informational needs of USDA customers</li><li>• The contractor must ensure timely update of all IVR messages in accordance with the turn-around time frames agreed with USDA</li></ul>
Automated Callback (telephone)	<ul style="list-style-type: none"><li>• The service must prompt the caller to provide information and provide an estimated callback time to the caller</li><li>• The service must automatically contact the caller at the estimated callback time, and connect the caller to an available agent</li><li>• If the callback encounters a voicemail or answering service, the service must leave a brief message indicating the purpose and time of the call and instructions for calling back</li><li>• If the callback encounters a busy or no-answer condition, the service must repeat the callback for up to 3 additional attempts. For billing purposes, each group of 6 callback attempts encountering a busy signal and/or no answer must be counted as a completed call.</li></ul>
Web Callback	The Contractor must provide a web callback to allow a customer visiting a USDA website and online customer service functions (e.g. web chat) to access the service and leave callback information for the Contractor to call back at a later time.
Automated Outbound Dialing and Texting	<ul style="list-style-type: none"><li>• The contractor must provide a fully automated solution to deliver a pre-recorded message furnished or specified by USDA to individuals/organizations on a listing provided by USDA</li><li>• The service must have the capability to accommodate a message of up to 90 seconds</li></ul>

Automated Email Delivery	The Contractor must provide a fully automated solution to transmit e-mail messages via the Internet to individuals/organizations on a listing provided by the Government. The service must have the capacity to accommodate formatted email messages
Email Web Form	The Contractor must provide a service to allow visitors to USDA websites to access a contractor-developed and maintained web form for submitting email inquiries to a designated email address. The web form interface must be designed to accommodate commonly used browsers and mobile platforms.
Inbound Telephone Inquiries	<p>The Contractor must answer inbound calls and provide complete responses to all telephone and TDD/TTY inquiries. The Contractor must accurately respond to inquiries in a professional and courteous manner. When an agent is unable to locate the answer to a customer's inquiry, they must warm transfer calls to the appropriate USDA subject matter expert and remain on the line until the caller's inquiry is successfully answered. The Contractor must capture and track information related to inbound inquiries in the Contractor provided customer relationship management (CRM) tool. This minimally includes the date and time of receipt, nature of the inquiry, source of the inquiry if multiple phone numbers are involved, customer identity, information requested, disposition, response date, and any fulfillment actions for tracking. The Contractor must recognize new trends of inquiries for referral to the appropriate USDA program so that appropriate knowledge articles can be created. All calls must be recorded.</p> <p>The Contractor is responsible for the provision, maintenance, design, implementation, operation, and management of these services.</p>

Inbound Chat Inquiries	<p>The Contractor must provide a fully integrated chat capability that, at a minimum, must provide the following:</p> <ul style="list-style-type: none"> <li>A. An ability to route inquiries to specific subject matter experts</li> <li>B. An ability to push clickable URLs to end users</li> <li>C. Allow the agent to guide customers through a website</li> <li>E. Allow the agent to access USDA's new knowledge management system to respond to inquiries <ul style="list-style-type: none"> <li>A. Ability for the end users to copy and/or print the content of the chat session and exchange</li> </ul> </li> </ul> <p>The web chat system must provide real-time monitoring capability and video recording capabilities. The Contractor must ensure that the transcripts of each chat session are accessible via the Contractor-provided CRM tool.</p>
Text Messaging	<p>The Contractor must provide an inbound and outbound social media service to support USDA text messaging.</p>
Social Media	<p>The contractor must respond to general social media inquiries that are posted via USDA social media channels.</p>

## Appendix D: Technology Infrastructure Requirements

General Infrastructure	The Contractor must provide and maintain a secure, highly available, scalable, 508 compliant, <i>omni-channel</i> technology infrastructure that is hosted in a virtualized and FedRamp certified environment. The Contractor also must ensure that any software as a service (SaaS) applications or tools such as a Customer Relationship Management System (CRM) are hosted in a cloud environment that is FedRAMP certified. The Contractor must ensure that technical systems are usable by both Contractor personnel and authorized federal staff, where appropriate. The service must provide both remote and onsite access.
Contact Processing Technology & Service	The Contractor must provide sufficient capability and capacity to support potential Tier 0 and 1 and eventually Tier 2 contact volumes through all channels (e.g., phone, chat, email, social media, digital properties), workload estimates and call routing in accordance with service level agreements. The Contractor must provide sufficient expansion capacity to accommodate changes in call patterns, surges (i.e., anticipated and unanticipated) not only for the OneUSDA Contact Center but also for other USDA contact and service centers as determined by USDA. It is anticipated that once the OneUSDA Contact Center is operational, other USDA contact centers will begin to provide volume forecasts and workforce schedules to the Contractor's Workforce Management Team so that they can begin building a consolidated USDA forecast and scheduling plan.
Call Routing & Distribution	The Contractor must ensure that the technology system must provide routing/distribution of incoming contacts based on the sequence of arrival/origination, inquiry type, agent's speciality and skills, agent availability, or other predefined routing instructions.
Computer Telephony Integration (CTI)	The Contractor must ensure the system is capable of displaying caller-relevant information at the desktop workstations (e.g., via screen pop technology). The displayed information may be triggered by DNIS, and/of ANI information, and/or through information entered by the caller or agent, and/or through data gathered by any automated service(s).
Consolidated Desktop	USDA will provide desktops



<p>Automated Systems Capability (IVR, virtual intelligent agents, etc.)</p>	<p>The Contractor must ensure that the automated system tool it selects, at a minimum, has the following functionality:</p> <ul style="list-style-type: none"> <li>A. Natural Language Processing Capability</li> <li>B. Channel Orchestration--the ability to introduce seamless interfaces with other channels</li> <li>C. Machine learning capabilities (i.e., for VIA type tools)</li> <li>D. Automated Call back capabilities</li> <li>E. Text to Speech Capability</li> <li>F. Simple to use Graphical System Design Interface</li> <li>G. Multiple telephone line support both on Analog and Digital</li> <li>H. Advanced call screening and call switching options</li> <li>I. Can be integrated with any type of database. Playback data retrieved from database</li> <li>J. Call Transfer to other extensions and external lines, optionally announcing the Caller ID, allowing the recipient to accept or decline the call</li> <li>K. Full logging of callers' details and all the selections made during the call</li> <li>L. Multi-Language support (English /Spanish)</li> <li>M. DNIS: (Dialed number identification service)</li> <li>N. ANI: (Automatic Number Identification)</li> <li>O. Provides automatic survey to customers after interaction</li> </ul>
<p>Dialed Number Identification Service (DNIS)</p>	<p>The Contractor must ensure the system is DNIS-enabled, in order to distinguish incoming calls by the called number and route them to the appropriate agent if applicable. The system must be capable of providing the appropriate call identification information (e.g., via a whisper announcement) at the agent or SMEs workstation.</p>
<p>Call Queuing</p>	<p>The Contractor must ensure the system queues incoming calls and provides callers with an estimated wait time in queue and other recorded messages. The system must provide the caller with an option to stay in queue or leave a message for callback based upon response to prompts. The system must provide the option for a caller, either during or upon completion of a callback message, to return to the queue without losing his or her place in the queue.</p>

Call Transfer	<p>The Contractor must ensure the system is capable of warm transferring contacts to Tier 2 or Tier 3 program specialists within USDA as specified by USDA.</p> <p>Warm call transfers should be able to be initiated manually by the agent and as requested by the customer. For example, if a customer knows that they want to speak with a loan specialist in the Rural Develops Home Loan program, the contact transfer function should accommodate.</p> <p>The Contractor must ensure the system has the ability to track the quantity and duration of warm contact transfers.</p>
TDD/TTY Calls	<p>The Contractor must ensure the system is equipped with Telephone Device for the Deaf (TDD) or TTY (ASCII) terminals for responding to inquiries from individuals who are hearing or visually impaired.</p>
Customer Relationship Management Solution (CRM)	<p>The Contractor must provide a scalable Software as a Service (SaaS) solution Customer Relationship Management solution. The Contractor must:</p> <ul style="list-style-type: none"> <li>A. Ensure that the CRM solution is usable by both the Contractor and authorized USDA staff;</li> <li>B. Maintain the SaaS CRM as needed and ensure that the CRM incorporates periodic updates as provided by the vendor (i.e., no older than n-1 version). CRM updates feature releases or maintenance fixes will be at no additional cost to USDA;</li> <li>C. Provide a CRM system with the ability to provide user credentials. This feature is not likely to be initially used, but should still be available for future use if the situation arises;</li> <li>D. Automated customer survey capability presented to the customer at the end of the interaction</li> <li>E. Provide a SaaS CRM solution with functional and operational capabilities for omni-channel handling;</li> <li>F. Provide a SaaS CRM solution with workflow management capabilities for all work types described in this RFP;</li> <li>G. Provide a SaaS CRM solution that will integrate seamlessly to Centralized Knowledge Management System;</li> </ul>



	<ul style="list-style-type: none"> <li>H. Provide a SaaS CRM solution with remote access capabilities such as via a web browser over the internet;</li> <li>I. Provide a SaaS CRM solution with capabilities to provide integrated customer and management dashboards;</li> <li>J. Provide a SaaS CRM solution with business analytic capabilities and tailored self-service reporting functionality</li> <li>K. Provide a SaaS CRM solution with data management and storage capabilities</li> <li>L. Ensure that the data collected will be stored a minimum of 3 years</li> <li>M. Provide a scalable CRM capable of providing data and software integration to include web services and/or API functionality for the purpose of integrating the CRM software and data with legacy contact center software used by Tier 2 and Tier 3 contact centers throughout USDA and websites</li> <li>N. Provide SaaS CRM API functionality allowing for the creation of modification of CRM data records programmatically from an external source;</li> <li>O. Provide SaaS CRM functionality capable of retrieving CRM data individually or in bulk for insert or storage into other applications</li> <li>P. Provide SaaS CRM functionality capable of CRM data integration with desktop applications such as MicroSoft Office and must create, update or alter customer applications based on events occurring in the CRM application;</li> <li>Q. Provide SaaS CRM functionality allowing for the free extraction (using standard industry formats such as XML or comma delimited) of data maintained within the solution. The Contractor must identify for USDA the extraction method to be used. The solution should allow for the data extraction to be performed by the Contractor or authorized USDA staff;</li> <li>R. Provide SaaS CRM functionality that is Section 508 compliant</li> <li>S. Provide SaaS CRM that has CTI/automated services capability</li> </ul>
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## Appendix E: Knowledge Management System Requirements

Platform Requirements	<ul style="list-style-type: none"><li>A. The KMS must be based in a FedRamp certified cloud environment.</li><li>B. Software as a service hosted delivery model that is interoperable with other modules/applications.</li><li>C. System must be web-based, conform to USDA's IT Enterprise Architecture Vision, and use USDA's standards for the shared databases and web servers.</li><li>D. System must integrate with different functional applications such as document management, correspondence tracking, reporting tools, documenting imaging, CRMs, IVR systems, executive dashboards, Office of Communication web publishing platform, and electronic forms.</li><li>E. System must support e-authentication/e-signature technology according to Federal security regulations.</li><li>F. System must support automated notifications regarding unavailability and availability.</li><li>G. System can be easily upgraded.</li><li>H. System must follow USDA Business Continuity Policies.</li><li>I. System can support expected increase in annual growth and a number of users in different geographic locations.</li><li>J. System must have a correspondence tracking system including logging, tracking, timestamping, notification, reporting, close-out, and routing based on business rules, workflow, and prioritizing.</li><li>K. System must have an answering request system that is secure, provides tracking, supports e-authorization/e-signature, and workflow management.</li><li>L. Help desk support</li><li>M. Feeds into HRIS/ERP systems.</li><li>N. ADA Section 508 compliant.</li><li>O. System is modular with ability to deploy and activate/deactivate functionality.</li><li>P. Plug-In Installation Center.</li><li>Q. Fully integrated live webcasting, live chat, and virtual meeting capabilities along with WebEx events.</li></ul>
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	<ul style="list-style-type: none"> <li>R. All system actions must be date/time stamped and tracked.</li> <li>S. System actions are to be stored in a secure database, searchable, and can trigger alerts.</li> <li>T. Records of system actions cannot be deleted.</li> <li>U. Whenever appropriate, system will use look-up lists to streamline routine operations.</li> <li>V. Dashboard reporting and analytics.</li> <li>W. Automated reminder system by email.</li> <li>X. System can prioritize requests, projects, documents, and electronic communications.</li> <li>Y. System can deliver alerts and documents through email</li> <li>Z. System must support inquiry management with integration to a USDA Customer Relationship Management tool.</li> </ul>
Customer Experience Tool Requirements	<ul style="list-style-type: none"> <li>A. Provide an integrated portal that can be fully branded using standard based languages and technologies (PHP, HTML5, CSS3, Java, etc.)</li> <li>B. Provide a portal environment that leverages responsive web design technology and renders pages based on type of device (PC, phone, tablet)</li> <li>C. Provide the ability to natively expose (programmatically not iFrame) information from the CRM (i.e., popular answers, alerts/notices) on web pages that reside outside the solution.</li> <li>D. Provide a fully-moderated community area on the portal where customers can ask/answer questions</li> <li>E. Provide domain security and field-level masking of sensitive data when using co-browse channel</li> <li>F. Provide chatbot technology that can determine intent and provide answers directly from the knowledge base, that can engage in deterministic dialogs and that can lookup information about specific questions/incidents in the CRM and provide status</li> <li>G. Provide the ability for customers to filter search results based on program area, answer type, document, type, etc.</li> <li>H. Provide excerpts of knowledge article that highlight search terms in the results page</li> </ul>

	<ul style="list-style-type: none"> <li>I. Enable users to rate knowledge articles so that the agency may determine answer efficiency and knowledge gaps</li> <li>J. Provide telephony integration directly within the CRM that enables screen-pops, skills-based routing to match inquiry with best agent, and interactive dialogs.</li> <li>K. Provide the ability to send proactive communications to large groups of registered users based on segmentation data such as program area, geographic region, customer/business type, etc.</li> <li>L. Provide a graphical workflow tool (similar to MS Visio) that enables the agency to quickly automate incidents/service routing</li> <li>M. Provide capability for customers to complete on-line dynamic interviews that show only the relevant data fields for the types of questions, previous responses that the user provided</li> <li>N. Provide the capability to access the responses in dynamic interviews against natural-language rules contained in simple tools like MS Word and Excel to make complex determinations like eligibility, program requirements and required supplemental documentation</li> <li>O. Provide the capability to conduct what-if analysis on dynamic interviews when rule criteria changes</li> <li>P. Provide the ability to conduct dynamic interviews in a disconnected mobile environment (i.e., in rural areas where there is no cell service)</li> </ul>
User Requirements	<ul style="list-style-type: none"> <li>A. User-configured home page</li> <li>B. Role-based login capabilities that provide encryption and lost password recovery</li> <li>C. Single Sign On to all parts of KMS</li> <li>D. Authorized users can create, edit, and delete email or in-system alerts that are automatically triggered by an event or date</li> <li>E. Only authorized users can view system actions</li> <li>F. The system should have a user tutorial</li> <li>G. System must provide standard navigation aids with the ability for users to skip through repetitive navigation</li> <li>H. The System must have interactive self-help that tells the user how to use the program including access to online</li> </ul>

	<p>user manuals</p> <p>I. The system must allow for collaboration with external users.</p>
Search Capability Requirements	<p>A. Searches can be saved, modified, deleted, and shared.</p> <p>B. Ability to search within a search.</p> <p>C. Searches can be by full-text, keywords, and metatags.</p> <p>D. The ability to search different file types (.doc, .xls, .mdb, etc.), scanned files (PDFs), and text within graphics.</p> <p>E. Searches can be by index, Boolean (simple and multiple), wild card, near spell, proximity, synonyms, exact phrase, and exclusion of terms.</p> <p>F. Search terms will be highlighted in the document or web page.</p> <p>G. Search can be canceled at any time.</p> <p>H. Search results can provide a list of hits along document object histories, progress through workflow routes, summaries of documents, or profile data of documents.</p> <p>I. Searches can be limited by time frame.</p> <p>J. List of most often requested results for a specified search term.</p> <p>K. Searches can be exported into common document formats (.doc, .xls, .pdf, etc.).</p>
Administrative Requirements	<p>A. Built-in Administrative Task wizards.</p> <p>B. Ability to manage look-and-feel of entire site along with branding. Ability can be automated via business rules.</p> <p>C. User administrator can create new user(s), configure permissions/roles, edit profiles, enroll users in courses, create user groups/domains, and search for users.</p> <p>D. Real-time reporting on demand that appear in application and can be printed without having to be exported.</p> <p>E. Standard reports and wizard-driven ability to create custom reports that can be exported to xls, csv, doc, rtf, pdf, etc.).</p> <p>F. Report is filterable by domain and user groups with the ability to drill down.</p> <p>G. New reports can be created, saved, and shared.</p> <p>H. Administrator can mass-distribute notifications, edit content of notifications, notify specific users, manage</p>



	<p>notification events, and determine who receives what notifications.</p> <ul style="list-style-type: none"> <li>I. Alerts can be customized by user or group level and can be sent to multiple users.</li> <li>J. Variety of alert messages depending on urgency.</li> <li>K. Alerts can be saved for re-use and can be stratified or sent as digests to avoid email box clutter.</li> <li>L. Alerts can be protected from user modification.</li> <li>M. Administrator can customize error messages.</li> </ul>
Document Management Requirements	<ul style="list-style-type: none"> <li>A. Document management is available for documents in different file formats and scanned documents.</li> <li>B. The system must have a library of standard documents and templates, version control, document storage, and ability to create customized documents or sort documents based on a FOIA request.</li> <li>C. The system must use agency naming conventions, can link documents, support meta-tagging/profiling of documents, annotation of documents, package documents of different file-types together, and previewing of files in HTML format.</li> <li>D. System must allow protection of documents as “permanent” and allow for auto-population of document/profile fields from correspondence system.</li> <li>E. Documents will have their own audit trail system with alerts and notifications when actions are taken with the documents.</li> <li>F. System must be able to capture documents in various sizes and thicknesses and convert these captured documents to PDFs while also allowing for Optical Character Recognition (OCR).</li> <li>G. System must be able to modify and redact sections of scanned documents.</li> <li>H. The system must offer an ability to manage and respond to Freedom of Information Act requests.</li> <li>I. The ability to freeze destruction automation for emails and documents relevant to an impending e-Discovery request.</li> <li>J. The ability to forward documents to the National Archives and Records Administration electronically.</li> <li>K. The ability to track retention periods for documents</li> </ul>

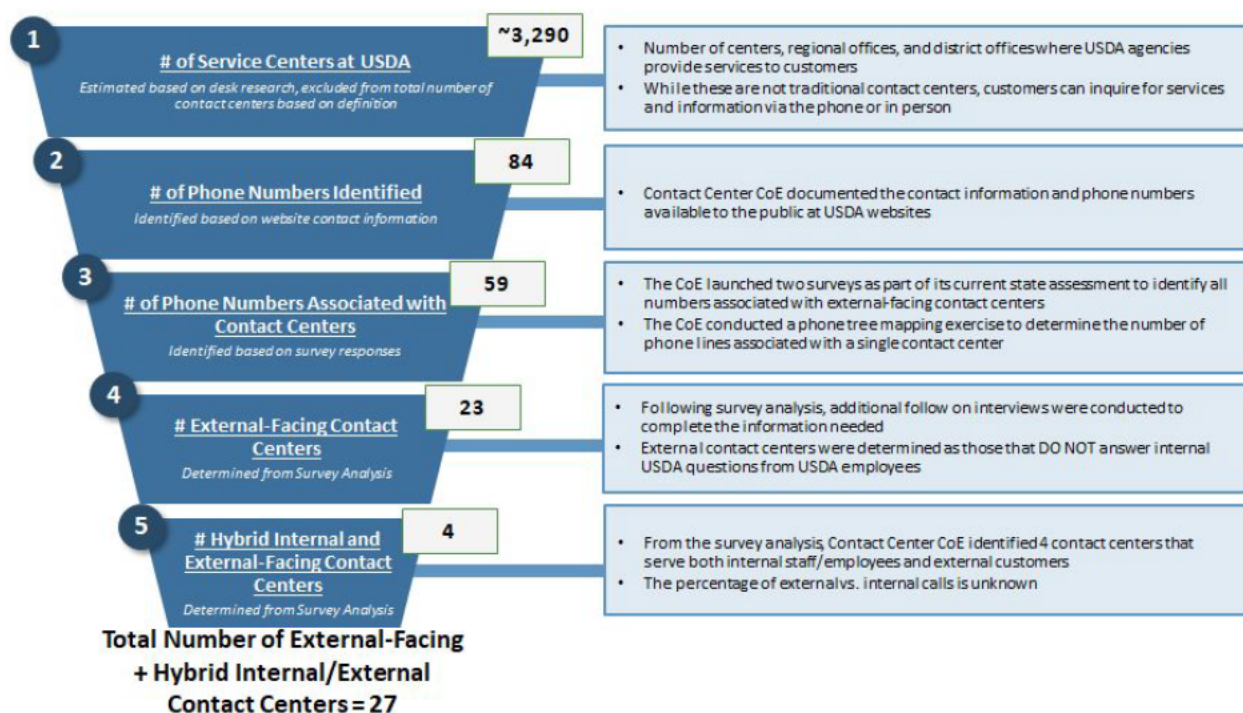
	L. Ability to route documents through workflow for approvals/electronic signature
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## Appendix F: Glossary of Terms

Terms	Definition
Tier 0	IVR or Artificial Intelligence
Tier 1	Directory Assistance, General Information Requests
Tier 2	Service Requests and Lightweight Transactions
Tier 3	Specialized Requests and Complex Transactions
Omni-channel	Unified Communications Across All Contact Center and Digital Properties (e.g., social media, websites, etc.)
Multi-channel	Integrated Contact Center Channels, Such as Phone, Chat, Email--Does Not Include Integration with Digital
Single Front Door	One Point of Entry That Allows Citizens to Quickly and Directly Engage With an Organization--This Will Facilitate First-Call Resolution



## Appendix G: Inventory of External-Facing Contact Centers at USDA



Agency	Program Name	Contact Center Name
FSA	<ul style="list-style-type: none"> <li>Acreage and Crop Reporting Streamlining Initiative (ACRSI)</li> </ul>	FSA Farm+ Service Desk
NRCS		NRCS Help Desk
FNS	<ul style="list-style-type: none"> <li>SNAP</li> </ul>	USDA National Hunger Hotline
		Retailer Service Center
		STARS
		Electronic Disqualified Recipient System (EDRS)
		USDA SNAP Information Line
		SNAP Quality Control System

	<ul style="list-style-type: none"> <li>Food Distribution Division</li> </ul>	FDD USDA Food Complaints
AMS	<ul style="list-style-type: none"> <li>Perishable Agricultural Commodities Act</li> </ul>	PACA Call Center
APHIS	<ul style="list-style-type: none"> <li>Animal Health</li> </ul>	APHIS Customer Service Center
	<ul style="list-style-type: none"> <li>Plant Protection and Quarantine</li> </ul>	PPQ Support Center
NASS	<ul style="list-style-type: none"> <li>Public Affairs Office</li> </ul>	NASS Customer Service
NIFA	<ul style="list-style-type: none"> <li>Office of Grants &amp; Financial Management</li> </ul>	Grant Application Help Desk
FSIS	<ul style="list-style-type: none"> <li>Office of the Chief Information Officer</li> </ul>	FSIS Service Desk
	<ul style="list-style-type: none"> <li>Office of Outreach, Employee Education, and Training</li> </ul>	Small Plant Help Desk
	<ul style="list-style-type: none"> <li>Office of Policy and Program Development</li> </ul>	askFSIS
FS	<ul style="list-style-type: none"> <li>Forest Service Information Center</li> </ul>	Forest Service Information Center
	<ul style="list-style-type: none"> <li>Recreation.gov</li> </ul>	Customer Service Line
	<ul style="list-style-type: none"> <li>National Forest Map Store</li> </ul>	National Forest Map Store
	<ul style="list-style-type: none"> <li>Pacific Northwest Research Station Communications, Applications and Publications group</li> </ul>	Pacific Northwest Research Station Communications, Applications and Publications group
	<ul style="list-style-type: none"> <li>Fire and Aviation Management, Washington Office</li> </ul>	National Interagency Fire Center
RD	<ul style="list-style-type: none"> <li>Single Family Housing</li> </ul>	SFH Direct Loan Service Customer Service Center
DM	<ul style="list-style-type: none"> <li>Office of Communications</li> </ul>	USDA Information Hotline
	<ul style="list-style-type: none"> <li>NFC</li> </ul>	National Finance Contact Center

**Appendix H: Abbreviations**

Abbreviation	Term
AI	Artificial Intelligence
BIA	Business Impact Analysis
CM	Content Management
COE	Center of Excellence
COTS	Commercial Off the Shelf
CRM	Customer Relationship Management
CX	Customer Experience
ERP	Enterprise Resource Planning
HRIS	Human Resources Information System
IVR	Interactive Voice Response
KM	Knowledge Management
KMS	Knowledge Management System
OC	Office of Communications
OCIO	Office of the Chief Information Officer
OCM	Organizational Change Management
OCR	Optical Character Recognition
PMO	Program Management Office
QCP	Quality Control Plan

RPA	Robotic Process Automation
Saas	Software as a Service
TDD/TTY	Telecommunications Devices for the Deaf
VOC	Voice of Customer